Time Study Program Coordinator Responsibilities

1. Attend coordinator training by MAM

2. Obtain access to the MAM automated system and set up other district users

3. Ensure participating eligible staff are trained in allowable activities and time study forms

4. Ensure time study data is entered into the automated

5. Review time study input via system reports

6. Ensure salary, benefit, and school calendar information in the system is accurate and current

7. Review and submit the final A-19 Invoice

Time Study Program Checklist

Annually:

_____ Input participating eligible staff list into automated system

_____ Input school year calendar in the automated system

_____ Train all participating eligible staff on time study process

Quarterly:

_____ Obtain random time study days for the quarter and inform MAM of any issues within two working days of the start of the quarter.

_____ Ensure all participants have been properly trained

_____ Verify salaries and benefits for participants in the system

_____ Review, process, and submit the A-19 invoice

For each time study day:

_____ Ensure all participating eligible staff receive a time study form for upcoming time study day, no more than 5 working days in advance

_____ Supervisor review and verify time study sheets within 5 working days of the time study day

_____ Ensure time study data is entered in the automated system

Time Study Program
Process

The Time Study is a method of measuring staff time and the percent of that time spent on Medicaid administrative activities. The time study serves as a basis to allocate the staff costs that should be attributed to Medicaid reimbursable activities. The time study should reflect the actual duties and responsibilities of participating school district employees over a set period of time. The following are chronological steps to detail the process.

Step 1: **Determine the list of participating eligible staff and input into automated system.**

From the charts below the district must determine the list of participating eligible staff.

Included Staff Charts

Program Codes*
01 – Basic Education
21 – State Special Education
31 – State Vocational Education
45 – State Skills Center
55 – State Learning Assist. Program
65 – State Transitional Bilingual
66 – State Student Achievement
74 – Highly Capable
79 - Instructional Programs

Activity Codes*
21 – Instructional Program Leadership
23 – Management and coordination
24 – Counseling and Guidance
26 – Health Related Services
27 - Teaching
28 - Extracurricular

Staff that are reported in the S275 under the above codes are potentially eligible to be participants in the time study. The district should evaluate the staff's assigned duties and activities within the above categories to determine which are reasonable to or appropriate to participate.

The staff listed in the "staff and security" section of the automated system MUST receive a time study form for each time study day. The only exceptions are those

staff in districts with 150 or more participating/non-designated staff. The non-designated participating staff within the larger districts will be part of a random selection process and will receive time study forms only if selected. **All staff listed in the "staff and security" section of the automated system must be trained as participants.**

Staff reported in the S275 or payroll in one or more of the codes listed below cannot participate in the time study. These staff should not appear in the "staff and security" section of the automated system.

Non-included Staff Charts

Program Codes*
24,26,29,38,39,46,51,52,53,54,56,57,61,64,67 ,68,69,71,73,76,77,78,81,86,88,89,97,98,99, CP, SB

Activity Codes*
11,12,13,14,22,25,41,44,51,52,53,61,62,63,64, 65, 67, 72, 73, 74, 75, 91, CP, SB

*The above codes are from the OSPI Appendix A of the S-275 Personnel Reporting Instructions for School Year 2003-2004, page 62.

Step 2: Training Participants

Participating eligible staff must be adequately trained before they can participate. Staff should have knowledge of Medicaid services available and Medicaid application processes. Training must include how to complete the form, how to report activities under the appropriate time study code and where to obtain technical assistance if there are questions. Professional staff must understand the distinction between the performance of administrative activities and direct medical services. The coordinator must document that staff were trained, to include name and date.

Step 3: Input Data into the Automated System

- Participating eligible staff list

The district must enter the list of participating eligible staff at the beginning of the school year, verify, and update the list quarterly. When entering the list of participating eligible staff, the districts should distinguish the designated staff by

checking the designated box in the "staff and security" section of the automated system.

Designated staff means those school district staff with primary Medicaid administrative responsibilities, including external coordination and linkage to the community, performing outreach to identify and inform Medicaid clients, assisting families with completing Medicaid applications, developing and planning methods to increase access to Medicaid services, coordinating with other agencies and community partners.

- <u>Salary and benefit data</u>

The MAM Ad Match system provides three options for coordinators to use to enter and manage the district's staff and salary/benefits data. These are: 1) manual data entry using the web interface, 2) copying the previous quarter's data already in the system, for use in the new quarter, and 3) uploading data from a PC at the school district (payroll extract) into the MAM system. Contact MAM if you need assistance.

The district is responsible for ensuring only funds that match are used to calculate the claim. Unmatchable funds are those that are already federally funded or reimbursed, those that are earmarked or targeted for other uses or will be used for match against another program. All contract information that is considered unmatchable should be deleted from the automated system. The S275 program codes generally correspond to funding sources and can be helpful in identifying unmatchable funding.

For those staff that are partially federally funded, the salaries need to be reduced by the amount that are impacted by the federal funding source. The associated benefit amount will also need to be reduced.

- <u>Completing the staff and security information</u>

    1. Ensure only participating eligible staff are loaded into the MAM automated system.

    2. Ensure designated staff are identified by clicking the check in the box marked designated staff.

    3. Ensure the annual contract information is accurately completed for each participating eligible staff.

        - Contracted days are usually stated in the contract document. In cases when they are not, contracted days are those days for which the employee is compensated. This <u>does include</u> days when employees are not required to be on the job but pay and/or leave is not reduced.

> This <u>does not include</u> regularly recognized holidays or days when school is closed and employees are not expected to be on the job.

- The district must determine which salaries and benefits to include. The funds <u>must be available to be used for match</u>. This means the funds cannot be from a federal program. The funds also cannot be used or have been used to match another program. Next, the district should consider whether the employee's duties associated with the contract dollars is reasonable to be included; or if in the performance of assigned duties under the contract will reasonably allow Medicaid activities to be performed.

- When including a portion of an employee's annual salary be sure to include only the benefits associated with the contracted salary. Base contracts are often divided between programs; therefore, associated benefits would also be divided. Supplemental contracts often do not include additional benefits; therefore, no reduction of benefits would be required. Benefit packages sometimes contain incentives. These additional costs are allowable, if the funds meet the other requirements stated above.

- When reviewing the salaries and benefits, or contract information, only include those that reflect payment for time included in the time study. Your non-school days will not be included and no adjustment will be required for these, if entered on your calendar.

  Example: If supplemental contracts apply only to after school time, you must include the after school time on your time study forms under "hours worked"; or not include the supplemental contract in the "staff and security" section of the system.

- <u>Calendar data</u>

> *Note: This is a change from the directions for 2004-2005. Only "school days" will be time studied. Consequently, only costs for "school days" will be used in the calculation of your claim.*

The district coordinator must ensure that the school year calendar is input into the MAM automated system. The school year commences with the first school day of the year. The school year calendar for each school year must be into the MAM automated system by August 1.

When inputting the school year calendar, the coordinator must add all non-school days to the calendar grid. The designated non-school days will not be included when the time study sample is run.

MAM will establish a default calendar with a begin date of September 1 and an end date of June 30. All national holidays and weekends will be designated as non-school days. MAM will assign a default Holiday break and Spring break.

The time study day selection will be run against the calendar, as it exists the scheduled day of the selection run. Since there is a variety of start dates for districts' quarters, MAM will conduct the selection run 10 working days prior to the earliest start date.

All districts are encouraged to check the MAM automated system well before the quarter start date to ensure a non-school day has not been selected for a time study day.

Below is the definition of school day:

RCW 28A.150.030 - School day.

A school day shall mean each day of the school year on which pupils enrolled in the common schools of a school district are engaged in educational activity planned by and under the direction of the school district staff, as directed by the administration and board of directors of the district.

- Updating Calendar Information:

Note: Additional information and direction can be found in the MAM Automated System Users Guide.

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1. Access the MAM automated system at http://admatchMAM.dshs.wa.gov
2. Go to Calendars off the main menu bar, located at the top of the screen.
3. Make sure you are in the correct school year.
4. Go to the calendar grid.
   - If you need to add an item, click on add a calendar item. From the drop down box, select a type of break or non-school day. Next select begin and end dates for the break type.
   - If you need to change the dates of a break or non-school day, click edit and enter the correct, begin and end dates.
   - **ALL BREAKS MUST HAVE A BEGIN AND END DATE, EVEN IF IT IS THE SAME DATE.**

See Section 5 of this Manual for the Automated System Users Guide for detailed instructions.

Step 4:   Obtaining the selected participating eligible staff and the Time Study Days

MAM will run the quarterly selection of the time study days and a selection of participating eligible staff for larger districts. The lists of time study days and participating eligible staff will be sent via email to the coordinator. The lists will also be posted to the automated system, ten (10) working days prior to the start of the quarter.

> *Note: Only the large districts receive a list of selected participating staff for the quarter.*

The coordinator can review the selected list of time study days and participating eligible staff by logging onto the system, going to "Reports", and selecting time study days or participating eligible staff. The coordinator is responsible for reviewing the selected days and staff prior to the start of the quarter. If there are any issues regarding the selected days or staff, notify MAM within the first two working days of the quarter.

- Replacement staff

The list of participating eligible staff in the automated system will serve as the participating eligible staff list for smaller districts. If an individual should be removed from the list, the coordinator needs to do this prior to the start of the quarter. The coordinator must submit a written request to MAM if an adjustment to the participating staff list is identified after the start of the quarter.

The coordinator for large districts should carefully review the list of selected participating staff. The coordinator must submit a written request to MAM for a replacement or adjustment to the selected participating eligible staff list.

Replacements and adjustments will be limited to unforeseen circumstances that were out of the control of the district.

- Replacement days

In the event a replacement time study day is required, the coordinator must request from MAM a replacement. A request with an explanation must be e-mailed to MAM (MAM-amsa@dshs.wa.gov) within two working days upon return from an event causing a missed time study day. MAM will notify the coordinator of the new time study date or the reason for a denial. Replacement days will only be issued when an event has occurred that was not within the control of the district. Replacement days cannot be made if the replacement would cause the time study to be biased.

Step 4: Conducting the Time Study

School districts having less than 150 staff will distribute time study forms to each staff listed in the MAM automated system for each time study day.

School districts having 150 or more staff will conduct the time study by two methods. Staff meeting the definition of designated staff and marked in the MAM automated system as designated should receive a time study form for each time study day. Staff entered into the MAM automated system, and not marked as designated, shall be part of a random selection process.

MAM will run a random selection of participating eligible staff each quarter. The list of selected staff will be provided to the coordinator, ten working days before the start of the quarter. Staff selected through the random sample should receive a time study form for each time study day.

Time study forms can be distributed to staff no more than five working days prior to the date of the time study day. Time study forms must be signed and verified by the staff's supervisor no more than five working days after the time study day.

Staff must complete the form for 100% of the activities conducted during the time study day. **Staff should not change their normal activities.** This means that staff should conduct their normal routine as scheduled regardless of the time study day. Staff should respond to events as they would any other day

- Time Study Form Instructions

   For the Coordinator:

   Ensure the time study form and the Quick Reference Guide are distributed to all participants. Make sure all participants have access to a current Medicaid Provider list. In preparation for each time study day, notify all participating eligible staff and distribute the time study and related form no more than five days in advance. It is required that all time study forms be signed and dated by the participating eligible staff's immediate supervisor within five working days of the time study day.

   For Supervisors:

   Participants may be informed of the time study day no more than five days in advance. Distribute the time study and related forms. In order to participate, staff must be trained on allowable activities and how to complete the time study form. Within five working days of each TS day, review and verify by your signature the completed time study forms. Please confirm with the participant that any changes made to the time study form are appropriate.

For Time Study Participants:

Only complete the time study for the randomly selected day indicated. Do not change your normally scheduled activities. This is important to the accuracy and validity of the time study. The left hand side of the form lists activity codes and a brief description of the types of activities under each code. For your time spent, fill in the bubbles to the right.

For activities performed in smaller increments of time throughout the day, use the Tick Mark column. Each tick mark represents a 15-minute increment of time. At the end of the day, total up the tick marks and complete the bubbles on the right. Next, total the hours tracked from the bubbles. Account for all time worked, which cannot be less than your contracted hours. After completing the time study form, sign and date the certification and promptly return the form to your supervisor.

For Medicaid related activity codes, a brief narrative describing the activity conducted is required.

Step 5:   Input of Time Study Data in to the Automated System

- Time study form data

    The coordinator must ensure all time study data are input into the automated system. A staff person may be designated to perform data entry of time study forms. The coordinator can set up limited access for other users into the system.

    > *Note: See Instructions on Claiming for Operating Expenses. Staff listed as participating eligible staff or staff in Program 97 are not able to claim for coordinating or input time.*

    After all data are entered, the coordinator must review and approve the time study submissions. There are several reports available that will assist in the review process. Once the coordinator electronically approves the time claimed, the time sheets are locked for the quarter and MAM reviews the time study data. An e-mail from MAM will be sent indicating whether the submission is approved or rejected. If rejected, MAM will submit questions to the coordinator for further clarification and the time sheets are unlocked.

Step 6:   Review and approve the time study

The coordinator must review the time study data and certify by approval that the data is complete, accurate, and ready for the A-19 calculation. There are many tools in the automated system that the coordinator can use to review the time study data.

The ability to set default and input restrictions are two such tools. These are discussed on page 31 of the automated system guide in section 5 of this manual. Additionally, there are a variety of reports available through the system under "reports".

Once the time study data has been approved by the coordinator, MAM reviews the data. MAM runs "staff claiming time with federal contracts" report MAM emails the coordinator with a list of any issues. Once the coordinator has responded to MAM, MAM approves the time study data.

The automated system sends the coordinator a notice that the quarter's claim has been approved. At this time, the A-19 may be generated and printed.

> *Note: Claims (A-19 Invoice Vouchers) submitted for Fall 2004 and thereafter, do not have to have the back-up report attached. The MAM automated system will retain this information.*

Step 7: Submit the Invoice for Reimbursement

Once the time entry submission is approved, the coordinator must print the A-19 Invoice. The district reviews and signs the A-19 Invoice and sends it to MAM. MAM records, in the MAM automated system, the date the claim (A-19) has been input for payment. Payment is issued to the district within four or five working days of this date.

If a payment is not received within two weeks of the posted pay date, contact the MAM Program Manager.

- Calculations

A-19 Calculation – School Ad Match Program (revision 10/04)

For each participant:

1. **Daily Rate** = Annual Salary* + Annual Benefits* + Indirect Cost**
                              Contract Days
    Districts must offset revenues (do not include federal and other salary and benefit costs that cannot be used as match for Medicaid funds)
    **Indirect Cost = Indirect rate x (salary + benefits)

2. **Daily Cost per Act Code** = Average Percent of Time Spent in Activity Code X Daily Rate

3. **Quarterly Cost per Act Code** = Daily Cost per Activity Code X # of Days in the Quarter
    Note: At this point, a Participation Adjustment is applied if the participant does not have 5 time study days entered in the system. See details below.

4. **Claimable Amount** = Quarterly Cost per Activity Code X MER Rate* X Federal Financial Participation Rate (FFP)
    *If applicable, the MER does not apply to codes 1b and 2b.

5. **Code 10**: The amount claimed as Code 10 is reallocated to the other codes based on the percentage of time spent performing all activities. The MER rate is not applied to the Code 10 reimbursement.

Rate of Reimbursement of Code 10 = $\dfrac{\text{Total Medicaid claimed hours over all time study days}}{\text{Total hours for 5 time study days}}$

Example: Employee A performed ½ hour of Code 9b activities on each TS Day
Info: Salary = $40,000, Benefits = $8,000, Hours per day = 8, Days per year = 210,
Time Study Days per quarter = 53, Indirect Rate = 15%, MER = 40%, FFP = 50%

1. **Daily Rate** = $\dfrac{40,000 + 8,000 + 7,200^*}{210}$ = $262.86
   Indirect Cost = .15 X 48,000

2. **Daily Cost per Act Code 9b** = .0625* x 262.86 = $16.43
   *.0625 = 2.5 total 9b hours/ 40 hrs reported**
   **40 hrs reported = 5 time study days X 8 hrs/day

3. **Quarterly Cost per Act Code 9b** = 16.43 X 53 = $870.79

4. **Claimable Amount =** 870.79 X .40 X .50 = $174.16

5. **If Employee A reported a total of 2 hours of Code 10 over 5 time study days:**
   Reimbursable Rate = 2.5 hours of Code 9b / 40 = .0625
   Code 10: Daily Cost = 2/40 X 262.86 = 13.14
   Quarterly Cost = 13.14 X 53 = $696.42
   Claimable Cost = 696.42 X .0625 = $43.53
   Claimable Amount = 43.53 X .50 = $21.76

Participation Adjustment

The participation adjustment assumes that no Medicaid related activities were performed on those time study days that time study forms were not turned in. If the above employee reported ½ hour of Code 9b on 3 time study forms and did not turn in the other 2 forms, a participation adjustment is applied to the quarterly cost per account (Step 3). In this example, $870.79 X 3/5 = $522.47 is the Quarterly Cost per Activity Code after the participation adjustment.